Dashboard page selections can be thought of as report prompts or data request parameters. They allow users to selectively filter the contents of a dashboard report and request data specific to their reporting requirements at any particular time. Many dashboard pages will present a ***"Basic"*** and an "***Advanced***" view of page selectors available. The basic page selection view includes the most commonly used search criteria, typically organization and/or account and fiscal year/fiscal period, while the advanced view provides a number of additional selection criteria.

- Change the Choose Selections Type to ***Advanced*** (vs Basic) for optimal "ad hoc" selection criteria. This will provide a view of all available parameters to use in requesting your data.
- **ALWAYS** clear out the default selection for ***"Please Make a Selection…"*** before choosing values for other page selections.
- Page selectors for ***Fiscal Year/Fiscal Period*** will always default to the current time period.
    - **ALWAYS** *select a Fiscal Year and/or Fiscal Period for your report.*
    - *Only one Fiscal Year/Fiscal Period can be selected per request on dashboard reports providing cumulative data (YTD, ITD, or To-Date) – this is known as single-select.*
    - *Multiple choices can be selected per request for Fiscal Year/Fiscal Period on dashboard reports providing transactional data (known as multi-select).*
    - *Saved Customizations with page selections set to current Fiscal Year and Fiscal Period = 13-Year End will always return the latest information for the cumulative views of data each time the report is accessed. This is useful if you do not care about reporting as of a month-end close.*
    - *For transaction reports, if it is the first day of month of the default Fiscal Period, you will need to change the selection to the previous month to retrieve posted transactions.*
    - *For YTD transaction reports, set the fiscal period selector to include all 13 fiscal periods (01-July through 13-Year End).*

Page selections are constrained; meaning that the list of possible values to choose in each selection box is limited by choices made in other selection boxes.

- Use the ***"Search"*** or ***"More/Search"*** at bottom of page selector drop-down list to open the Select Values dialog box to provide greater search efficiency.
    - *Use the "Contains" operator vs. the "Starts" operator and un-check the "Match Case" in the Select Values dialog box to decrease chances of failed searches.*
- **BEST PRACTICE** to select a value for ***Organization*** or ***Account(s)*** for report requests.
- **ALWAYS** select ***Organization*** and/or ***Account*** in addition to the particular data element when searching by transaction account string components such as sub-account, object code, or sub-object code.
- **NOTE** about ***Acct Is Closed*** selector: Defaults to "N" to capture only open accounts. It may be necessary to set this to include both "N" and "Y" when requesting prior fiscal years/periods to ensure you retrieve all relevant financial data.
- **BEST PRACTICE** is to select only one ***Parent Organization*** per request. In situations where multiple organizations are selected in the same request, **do not** request a list of organizations where one or more report up to another organization in your selection list.
    - *For example: Do not select "C - Arts and Sciences" and "D – History" in the same request. The History department reports to the college of Arts & Sciences, and thus the $$$ will be inflated for the accounts in "D-History". There is no need to select "C - Arts and Sciences" if one wants to view only the History department's account balance listing.*
- Use ***Basic Acct Category*** to filter out asset, liability and fund balance activity (select for 'IN' and 'EX').
- Use ***Balance Type*** to filter out budget and/or encumbrance transactions (select for 'AC').
- Use the ***Reset Page*** button to clear out selections and start new report request.